U.S. Department of Agriculture
WorkLenz Instruction Manual
Microsoft Project Import and Export

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NOTE: We recommend that all users initially export their project (or an appropriate project template) out of WorkLenz prior to importing them. Doing so will ease the import process later as well as ensure data integrity and template conformance. Exporting instructions begin on page 9.

We also recommend that users who will be importing a new MS Project file into WorkLenz first contact the USDA PMO for assistance with their initial upload. See page 14 for contact information.

Welcome to WorkLenz™ for project portfolio management!

WorkLenz integration with Microsoft Project includes the ability to import and export project plans. Exported project plans can be updated and re-imported into WorkLenz. WorkLenz interacts with Microsoft Project via XML, available in Microsoft Project 2002 and subsequent versions. Use this training guide in conjunction with the WorkLenz Version 4.7 Training Guide to learn about project portfolio management in WorkLenz.

Microsoft Project Import

WorkLenz allows users to import project plans directly from Microsoft Project 2002 and subsequent versions that have been converted to an .XML file. Accessed through the administration menu, Microsoft Project files can be imported at the portfolio, program and project levels and will be created at the next lower level in WorkLenz. For example, a Microsoft Project file imported at the portfolio level will create a new program or programs in WorkLenz.

WorkLenz offers an MS Project Import wizard to guide users through the process of importing a file. Because WorkLenz contains more structured elements than MS Project that allow for reporting across the portfolio, the first time a project file is uploaded, users will have to establish new resources and define the types and categories for their program, projects phases and tasks. Length of time to complete this process will vary depending on the size and complexity of your MS project file. The following section will detail the steps followed in the wizard.

How to import a project plan from Microsoft Project to WorkLenz:

1. Save your Microsoft Project file as type 'XML Format.'

2. Navigate to the appropriate WorkLenz level for import. For example, if you want to import a project, go to the appropriate program summary screen.

3. Click the *Admin* link in the action bar.

4. Click the *Microsoft Project Import* link.

Figure 1: Select File for Import

The first screen prompts you to load your Microsoft Project file, and to select the type of import. **Partial import** will load the file into WorkLenz, and will not delete any data already in WorkLenz. If this file has been imported into WorkLenz before, it will update the data items and create new items, but will not delete any items already in WorkLenz. **Full import** will make the WorkLenz data identical to the Microsoft Project file, including adding and deleting data. Any data already in WorkLenz will be overwritten or deleted using full import unless you use the WorkLenz synchronized Project file. Select the type of import, identify the XML-formatted Microsoft Project file and select *Load*. WorkLenz will scan the file and present a screen for user review. Click *Continue* to accept the file as loaded.

5. Browse to find your saved XML file and click *Load*.
    a. If you receive an error message, verify that you are importing an XML file.

6. Review the resources and schedule presented (Figure 1). If the items presented are correct, click *Continue*.
    a. Items with blue text are being imported for the first time.
    b. Items with black text are being re-imported.

Figure 1

7. Provide information for all resources being imported (Figure 2).
    a. If the user already exists in WorkLenz, select the WorkLenz Person from the dropdown list (A).
    b. If the user is new in WorkLenz, provide the requested information: User ID, Password, Title, Person Type, Email Address, Rate, and Cost (B). Rate for USDA is always 0 as revenue calculations are turned off. Cost is based on the Pay Grade of a user times a standard overhead percentage.
    c. If the schedule contains no resources, all tasks will be assigned to the Generic User and you will not be prompted for any information.

Figure 2

At this point in the wizard, WorkLenz will request information specific to the USDA taxonomy that is not typically collected in MS Project. Please refer to Appendix A, the USDA Taxonomy, for further definitions.

If you are importing at the portfolio level, continue to step 8.
If you are importing at the program level, continue to step 9.
If you are importing at the project level, continue to step 11.

8. Select the appropriate program type for the program(s) being imported for the first time (Figure 3).

    a. Programs being re-imported will not require a program type since that information already exists in WorkLenz.

Figure 3

9. Select the appropriate project type and category for the project(s) being imported for the first time (Figure 4).
    a. Projects being re-imported will not require a project type or category since that information already exists in WorkLenz.

Figure 4

10. For each project, WorkLenz will ask you if you would like to create project role and team information (Figure 5).
    a. If you click yes, indicate how many roles and teams you would like to create (Figure 6) and complete the role and team information (Figure 7).

Each project is unique and can define as many roles and teams as necessary to appropriately categorize the work being done. For more information on Clearance Levels, please refer to Appendix A.

b. If you click no, a generic role and team will be created.

Figure 5

Figure 6

Figure 7

11. Select the appropriate phase type for the phase(s) being imported for the first time (Figure 8).
    a. Phases being re-imported will not require a phase type since that information already exists in WorkLenz.

Figure 8

12. Select the appropriate task type for the task(s) being imported for the first time (Figure 9).
    a. Tasks being re-imported will not require a task type since that information already exists in WorkLenz.

Figure 9

13. Review the summary screen of resources and schedule information (Figure 10).
    a. If the information is correct, click *Finish*.
    b. If you need to make changes, click *Back* and make the appropriate changes.

Figure 10

14. WorkLenz will prompt you to download an updated XML file (Figure 11). Click *download* and save the XML file.

> **Note***:* This synchronized file contains the WorkLenz information that you just completed. <u>This file, not the original file, MUST be used for all subsequent re-imports</u>. If this file is not used, WorkLenz will treat the file as a new file and require all information to be defined again.
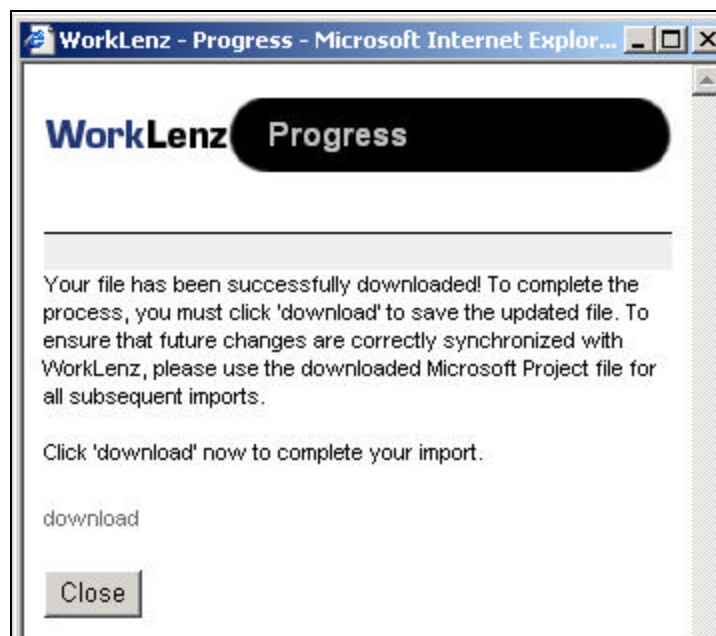
Figure 11

How to re-import a project plan from Microsoft Project to WorkLenz:

1. Open either a synchronized XML file or an exported XML file in Microsoft Project and make any necessary updates.

   Note: An already identified program, project, phase, or task cannot change levels if being re-imported into WorkLenz. See the *Frequently Asked Questions* section of this guide for details.

2. Resave the Microsoft Project file as type 'XML Format.'

3. Navigate to the appropriate WorkLenz level for import.

4. Continue with steps 3-14 above.

   Note: WorkLenz will only prompt you for information about resources, programs, projects, phases, and tasks being imported for the first time.

Microsoft Project Export

WorkLenz allows users to export project plans directly to Microsoft Project 2002 and subsequent versions via XML. Accessed through the administration menu, Microsoft Project files can be exported at the portfolio, program and project levels.

WorkLenz offers an MS Project Export wizard to guide users through the process of exporting a file. The following section will detail the steps followed in the wizard.

How to export a project plan from WorkLenz to Microsoft Project:

1. Navigate to the appropriate level in WorkLenz.

2. Click the *Admin* link in the Action bar.

3. Click the *Microsoft Project Export* link.

4. Click *Next* to begin.

5. WorkLenz allows users to create and store export criteria.
   a. Click *Yes* to use an existing export and select a report from the dropdown (Figure 12). Continue to step 8.
   b. Click *No* to select new criteria and click *Next*.

Figure 12

6. Select the lowest level of information that you would like to export (Figure 13). If you select tasks, the export will contain programs, projects, phases, and tasks. Click *Next*.
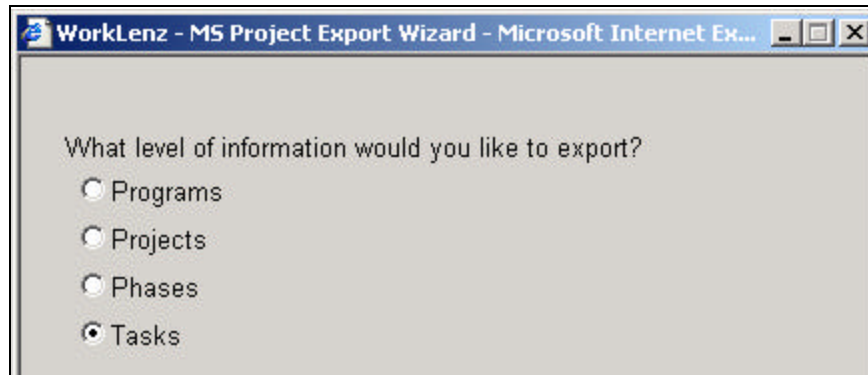
Figure 13

7. Each exported level can be filtered (Figure 14), similar to the advanced filter functionality on the list pages. Options include WorkLenz level, title keyword, type, status, and portfolio-level metadata.
    a. Click *Yes* to make the filter options appear. Check the appropriate option and select the desired criteria. Click *Next.*
    b. Click *No* if you do not want to filter. Click *Next.*
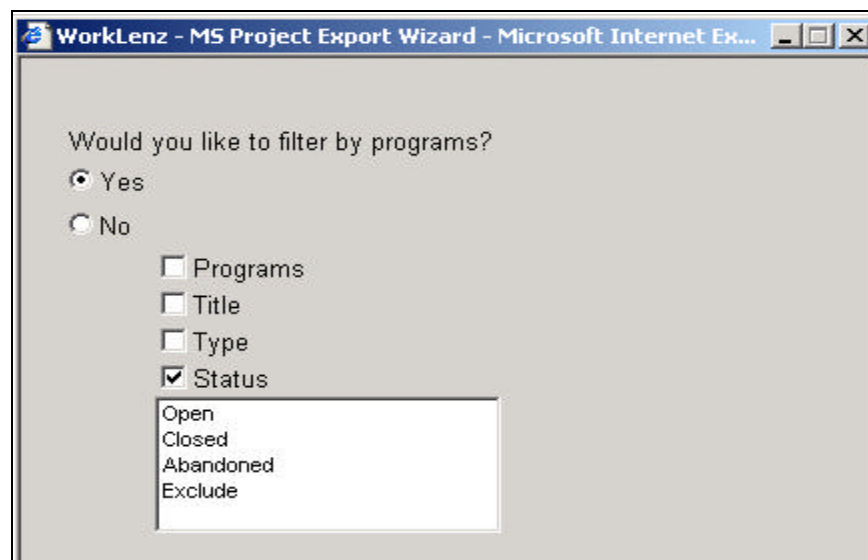
Figure 14

8. Repeat Step 7 above for each Project, Phase and Task Level.

9. WorkLenz also allows you to chose between exporting the entire structure of your project plan or just the selected level.
    a. Click *Yes* to only export the lowest level of filtered data. If you are exporting to the task level, only tasks will be exported.
    b. Click *No* to export the entire structure of the project plan. This will export from the level you are exporting at down to the level you selected in step 6.

10. When exporting templates, users will not want to export the WorkLenz Ids so that the files can be re-imported to create new projects. The next question WorkLenz asks is whether the user wants to export these project Ids.
    a. Click *Yes* to export the Ids. This option should be used for established project plans
    b. Click *No* if the Ids should not be exported. This option should be used for exporting templates.

11. WorkLenz allows you to save export criteria for future use (Figure 15).
    a. Click *Yes* to save the export criteria. Complete the name and description fields. Click *Next*.
    b. Click *No* if you do not wish to save the export criteria. Click *Next*.

Figure 15

12. Review the summary screen of the selected export criteria (Figure 16).
    a. If the information is correct, click *Finish*.
    b. If you need to make changes, click *Back* and make the appropriate changes.
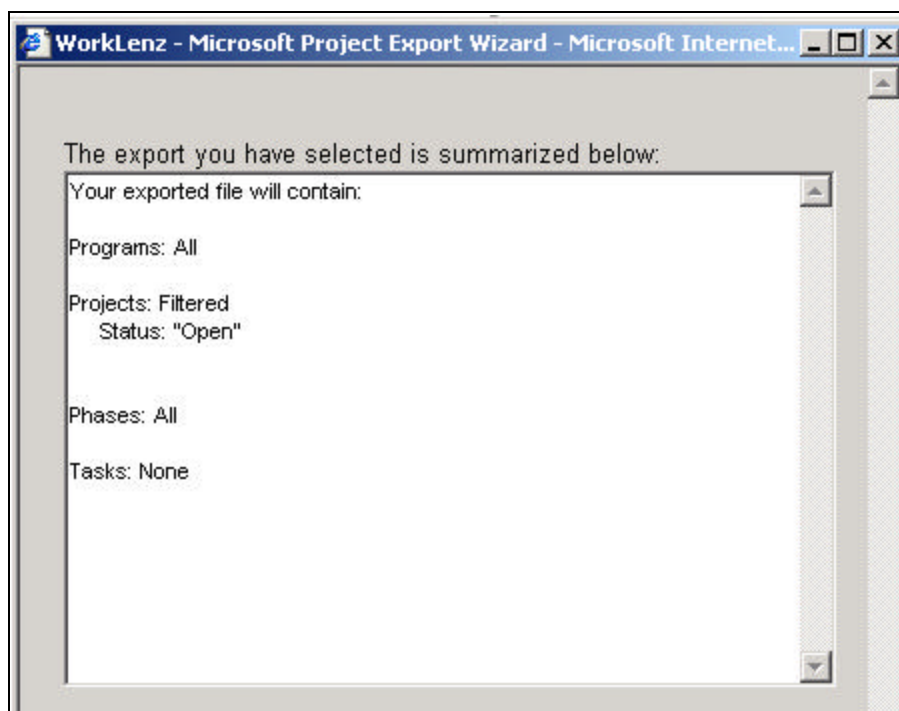
Figure 16

13. WorkLenz will prompt you to download the exported XML file (Figure 17). Click *download* and save the file.

Figure 17

14. Open the XML file in Microsoft Project 2002 or subsequent versions.

15. If you make changes to the exported file and need to re-import it, refer to the directions on page 3 of this guide.

Frequently Asked Questions

Can I re-import my original Microsoft Project file?
No, you should not re-import an original Microsoft Project file because it is not synchronized with WorkLenz. You should only re-import the synchronized file that is downloaded following an import, or an exported file.

How will my Microsoft Project file be structured in WorkLenz?
If you are importing at the portfolio level:
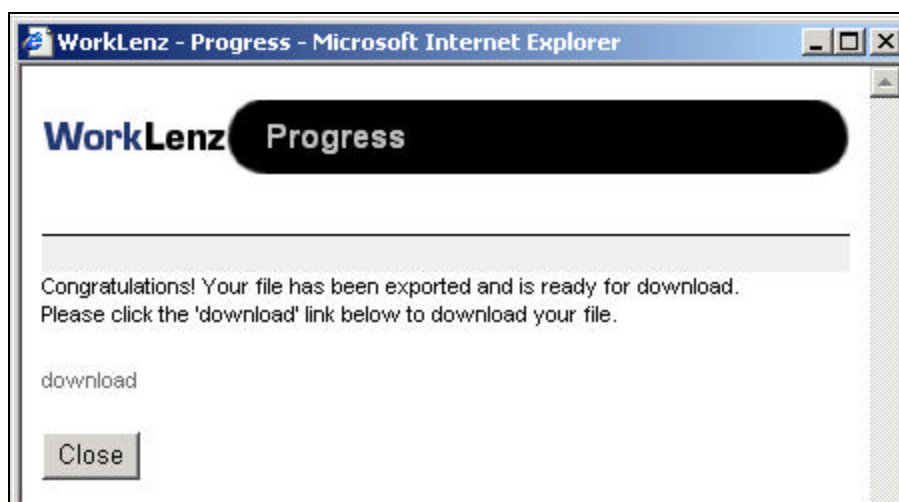- ?? Outline Level 1 in Microsoft Project: WorkLenz program(s)
- ?? Outline Level 2 in Microsoft Project: WorkLenz project(s)
- ?? Outline Level 3 and lower in Microsoft Project: WorkLenz phase(s)
- ?? Lowest level(s) in Microsoft Project: WorkLenz task(s)

If you are importing at the program level:
- ?? Outline Level 1 in Microsoft Project: WorkLenz project(s)
- ?? Outline Level 2 and lower in Microsoft Project: WorkLenz phase(s)
- ?? Lowest level(s) in Microsoft Project: WorkLenz task(s)

If you are importing at the project level:
- ?? Outline Level 1 and lower in Microsoft Project: WorkLenz phase(s)
- ?? Lowest level(s) in Microsoft Project: WorkLenz task(s)

Why did I receive an error trying to re-import a synchronized file or an exported file?
The most common error received on re-import is due to the user trying to change the WorkLenz level of an existing item. If an item has already been imported to WorkLenz, the original level cannot be changed in Microsoft Project and re-imported because each level in WorkLenz has different attributes. For example, if an item has been imported as a WorkLenz project, it must be re-imported as a project in the Microsoft Project structure outlined above. Contact your WorkLenz consultants if you have specific questions about a Microsoft Project file or a re-import error.

Can I import team assigned tasks from Microsoft Project to WorkLenz?
Yes, you can import team assigned tasks into WorkLenz. Importing a resource-loaded schedule into WorkLenz gives insight into resource availability and performance metrics.

Will I have to select every type each time I import or re-import a project plan?
No, you will not have to select the type each time you import a Microsoft Project file. The first time a project plan is imported, the user will be prompted for the program, project, phase, and task types. Once the type has been identified initially, the user will not be prompted to select the type on re-imports since that information already exists in WorkLenz.

If my Microsoft Project file contains a field that is not standard in WorkLenz, will it import and export?
Extended attributes in Microsoft Project will import as custom fields in WorkLenz as long as the field is created in WorkLenz prior to importing. Extended attributes in Microsoft Project files include text fields, date fields, and flag fields. These fields will also export from WorkLenz to Microsoft Project. Consult your WorkLenz Version 4.7 Training Guide to learn more about creating custom fields in WorkLenz.

Can I import files with more than 5 levels? Are there any different steps I need to follow?

WorkLenz supports project plans to the nth level as opposed to previous versions of WorkLenz. These additional levels are treated as "nested" phases. There are not any additional steps. WorkLenz will recognize the file contains multiple levels and map it to the taxonomy as appropriate.

How many project roles can there be?

Project roles provide the project manager the ability to departmentalize the resources across the project based on function. Because each project is different, WorkLenz provides the ability to define as many or as few project roles as the Project Manager likes. If there are people assigned to the project though, there must be at least one project role and one project team defined.

Who can I contact with questions about MS Project Import/Export functionality in WorkLenz?

Please do not hesitate to contact the USDA PMO Services team with any questions regarding the information contained in this training guide.

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Appendix A

USDA Taxonomy Structure

Portfolio:

UnitedStatesDepartment
ofAgriculture(USDA)

Programs: Agencies

Examples

FS
FNS
OCIO
RMA

Types:
Mission Areas
(e.g. Food Safety)

Projects: Investments

Examples

eGrants (CSREES)
Automated Targeting System (ATS)
IT Consolidation
Integrated Personnel System (IPS)

Types:
CPIC Phase (e.g. Select)
Categories:
Portfolio Segments (e.g. Infrastructure)

Requirements
Design
Development

Phases:

Examples

Alternative Analysis   Requirements
Process Planning   Design
Resource Planning   Development
Business Case   Testing

Types:
Alternative Analysis
Process Planning
Resource Planning

Review
LOE
Measurable

Tasks:

Examples

Create Security Plan
Obtain Approval of cost goals from CFO
Design Section 508 compliance capabilities
Map Strategic Goals to PMA

Deliverables
Milestones
Work Activity

Types:

1. Portfolio

U. S. Department of Agriculture (USDA), providing visibility into the entire portfolio.

1.1. People

People are defined at the portfolio level and can be associated with any level in the application. Each user can have a different security clearance for each project they are assigned. The roles currently defined in the USDA Taxonomy are listed in the table below.

WorkLenz Security Model				
WorkLenz Security Group	USDA Security Group	USDA Role	Gives Access to:	Who can assign:
Portfolio Admin	OCIO Read/Write	OCIO	View, Write and Admin Access to all Agencies' project data.	OCIO Read/Write
Portfolio Executive	OCIO Senior Executive View	OCIO Executive	View access to all Agencies' project data.	OCIO Read/Write
Program Admin	Agency Read/Write	Agency Portfolio Managers	View, Write ad Admin Access to an Agency and all Investments/Systems within that Agency when added as a program team member	OCIO Read/Write, Agency Read Write
Program Manager	Agency Senior Executive View, Agency Partner View	Acency Executive, Investment Project Managers	View Access to an Agency and all Investments/Systems within that Agency when added as a program team member	OCIO Read/Write, Agency Read Write
Project Admin	Investment/System Read/Write	Investment Project managers, ISSPM	View, Write and Admin Access to an Investment/System when added as a project team member	OCIO Read/Write, Agency Read/Write, Investment/System Read/Write
Project Manager	Investment Partner View	Acency Executive, Investment Project Managers	View Access to an Investments/System within an Agency when added as a project team member	OCIO Read/Write, Agency Read Write, Investment/System Read/Write
User Group	Timesheet User	Investment team members, Security Team members	Add or delete time on the timesheet only when assigned to a task. Must be added as an investment team member before a task can be assigned.	OCIO Read/Write, Agency Read/Write, Investment/System Read/Write

The portfolio is composed of programs, which are…

2. Programs

The 29 Agencies and Staff Offices that comprise USDA:

- ?? Farm Service Agency
- ?? Foreign Agricultural Service
- ?? Risk Management
- ?? Food and Nutrition Service
- ?? Center for Nutrition Policy and Promotion
- ?? Food Safety and Inspection Service
- ?? Agricultural Marketing Service

- ?? Rural Development
- ?? Office of Chief Financial Officer
- ?? Office of Chief Information Officer
- ?? Office of Communications
- ?? Office of Congressional Relations
- ?? Office of Chief Economist
- ?? Office of Budget and Program Analysis

- ?? Animal and Plant Health Inspection Service
- ?? Grain Inspection, Packers and Stockyards Administration
- ?? Forest Service
- ?? Natural Resources Conservation Service
- ?? Agricultural Research Service
- ?? Economic Research Service
- ?? Cooperative State Research, Education, and Extension Service

- ?? Office of Executive Secretariat
- ?? National Appeals Division
- ?? General Counsel
- ?? Office of Inspector General
- ?? Office of Civil Rights
- ?? National Agricultural Statistics Service

2.1. Program Type

The 8 Mission Areas within USDA:

- ?? Farm and Foreign Agricultural Services
- ?? Food, Nutrition, and Consumer Services
- ?? Food Safety
- ?? Marketing and Regulatory Programs

- ?? Natural Resources and Environment
- ?? Research, Education and Economics
- ?? Rural Development
- ?? Departmental Administration/Staff Offices

Each program is composed of projects, which are…

3. Projects

The 55 major IT investments collected during the initial implementation as well as the Systems being tracked for C&A. The project level is also being utilized for Non-major IT investments within USDA.

3.1. Project Type

The 5 CPIC Phases for Major and Non-Major Investments and a classifier for Systems being tracked for C&A:

- ?? Major Pre-Select
- ?? Major Select
- ?? Major Control
- ?? Major Evaluate
- ?? Major Steady-State

- ?? Non-Major Pre-Select
- ?? Non-Major Select
- ?? Non-Major Control
- ?? Non-Major Evaluate
- ?? Non-Major Steady-State
- ?? System

3.2. Project Category
The 6 Portfolio Segments:

- ?? Grants
- ?? Legislative Mandates
- ?? Growth
- ?? Infrastructure
- ?? Enhancements
- ?? Innovation

Each project is composed of phases, which are…

4. Phases
The phases of the proposed project plan templates, allowing for functional grouping.

Examples of typical phases:
- ?? Process Planning
- ?? Alternative Analysis
- ?? Requirements
- ?? Design
- ?? Development
- ?? Testing

4.1. Phase Type
A one-to-one mapping of the phase type to the phase name enables USDA to compare phases across investments and agencies.

Phases are composed of tasks, which are…

5. Tasks
The tasks of the proposed project plan templates.

Example of typical tasks:

- ?? Hold Section 508 Compliance Review
- ?? Submit cost goals to CFO for review

5.1 Task Type
Entities of work:

- ?? Internal Work Product
- ?? External Deliverable
- ?? Milestone
- ?? Work Activity
- ?? Review